



- Global company
- 13 foreign branches
- 100 thousand implementation per year
- Multilingual approach
- 24/7 operations
- Distributor network
- Cloud strategy

# The way to use CRM

## a product with significant added value

A case study of a CRM solution based on the Microsoft Dynamics 365 platform at ComAp a.s.

Lighting and Power Control at the Singapore F1 Grand Prix, Solar/Diesel Hybrid Power System for an Isolated Kiribati island in Pacific or backup power of the O2 arena.. you have to recognize that these are extremely challenging tasks. So let's ask the question, how did ComAp overcome such a complex challenge as choosing a suitable CRM solution in comparison with such demanding projects? Let's look at this project more in detail.

### Default state

ComAp implemented CRM for the first time in 2015. During the following four years of its use, however, the needs in the company significantly grew and changed, and it became increasingly challenging to respond somehow to all requirements by use of implementation of CRM partial changes.

In 2017 ComAp engaged a project manager Pavla Setničková. The main aim was to support and improve current maintenance procedures and to develop new applications. The reason for this engagement was that the business department was dissatisfied with the current state of the CRM system as well as with the ongoing implementation of the ERP system Microsoft Dynamics for Operation Release 1. In 2019, therefore, the company decided to move to a new stage of development.

The bottleneck of the whole solution was undoubtedly the slow responses of the system

ComAp, as a global customer of Microsoft using the premier support services provided by Microsoft, had therefore decided to make use of the support services in the form of a performance review - which in other words meant to perform an analysis, with changes made to the results of this analysis resolving slow system responses. Even though the original supplier participated successfully in resolving the system performance issue, any further applied changes had caused additional errors in its functionality which then created further instability as well. This resulted in high costs associated with the operation and maintenance of the system. These unfortunate facts affected both the supplier and its development, as well as the customer's administrative processes, including internal testing.

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Silver Small and Midmarket Cloud Solutions

NAVERTICA  
A BETTER BOTTOM LINE

# Case study ComAp a.s. - The way to use CRM

The company faced an important decision: how to optimally integrate a CRM system with the new ERP Release 2? Will you need to refactor your existing Microsoft Dynamics 365 Customer Engagement system? Or create a new CRM with Power Apps technology, or leave the solution on the Microsoft platform and replace it with a competing Salesforce solution?

## The road to change...

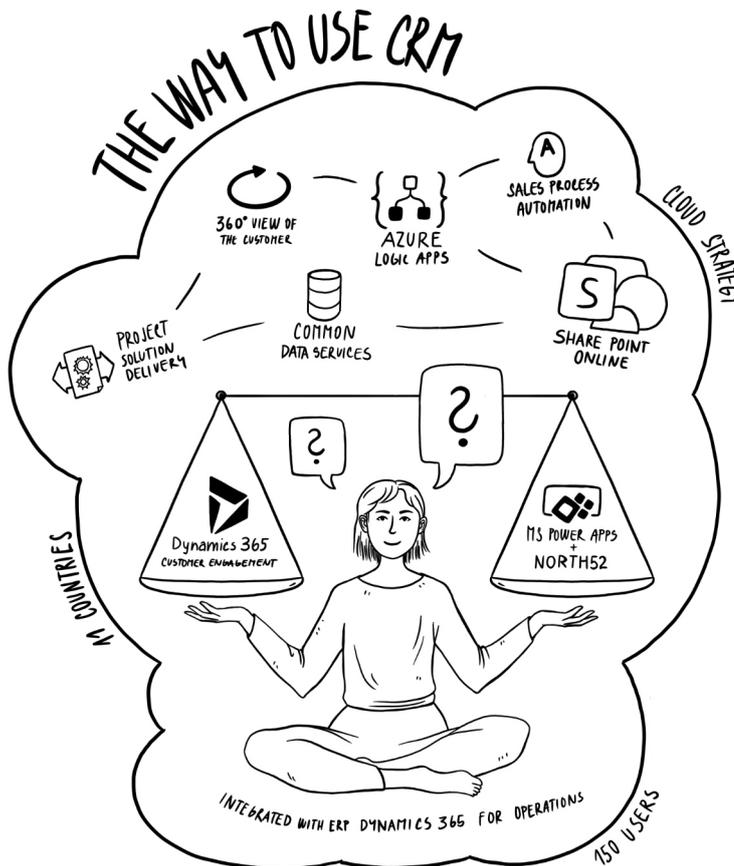
The primary step was to change the original supplier. Due to dissatisfaction with the state of CRM and the implementation of ERP R1, the management firstly decided to announce a tender for a change of ERP supplier and only subsequently to solve with all technological changes to the existing CRM. As ComAp is a global company, not only local but also foreign suppliers were interested in the tender. The tender took place over three months, and the winner was a Microsoft partner company Intelligent Studios. This company is also a long-term partner of NAVERTICA a.s., which also participated in the implementation of ERP.

## Another challenge was the approach to CRM...

After the initial analysis carried out by NAVERTICA, it was apparent that it is crucial to take the necessary steps to provide detailed information to the customer about the current state of instability and opportunities aimed at selecting the right approach.

## Three reasons for system instability:

1. Excess customization caused by changes in standard functionality to suit the B2B business model /distributors and system integrators/.
2. The weakness of the development team on the part of the original supplier.
3. Absence of documentation, over 180 workflows, dozens of plugins, and many more - without any documentation on continuity and functionality.



Based on Microsoft's recommendations, we consider the following two options:

1. Use the existing Microsoft Dynamics 365 Customer engagement platform as a technological basis. Given the company's specific business model to suppress the standard functionality of the system, which is rich in applications and functions, but unfortunately unsuitable for ComAp. It would mean extensive modifications to the standard, and any change would be challenging to analyze and develop.
2. Investing in a newly designed solution built on Microsoft Dynamics Power Apps with the North52 customization framework.

The goal was clear: to get added value for the company on a global scale with a suitable CRM solution with support 24 hours a day. It means provide ComAp merchants with a reliable, stable, and robust system that is globally available, user-friendly, supports a unified business process, and provides a comprehensive view of the customer. At the same time, it will give the managers a quality overview of the status of business activities.

"At this point, the major debate in ComAp was about whether to stay with Microsoft or move to Salesforce. From their point of view, it was not clear whether this was a platform or supplier error. It was necessary to convince the customer that we know how to build their solutions again and more efficiently, that it makes sense to trust the Microsoft platform, and that it is only a matter of approaching the solution design and implementation process pragmatically and effectively."

Vít Matýšek  
Project Manager NAVERTICA a.s.

# Case study ComAp a.s. - The way to use CRM



## Decision...

After examining all the options, risks assessment, confirming that everything is following Microsoft's licensing policy, the steering committee decided on the variant of Microsoft Dynamics Power Apps with North52.

The solution also included Common Data Services, LogicApps, a system integrated with ERP, sales automation, project solutions delivery, a 360 ° view of the customer for salespeople - business data (orders, invoices) generated by ERP fully available in CRM.

*"From a personal point of view, we understood each other very well as early as 2017, when NAVERTICA a.s. professionals carried out an analysis on Scribe. If you find a sense of like-mindedness, progressiveness, flexibility in your implementation partner, you feel his courage to go into new things, you are both globally and technologically focused on everything, and he also becomes your professional advisor... a sureness of good cooperation and vision of successful implementation is beyond any expectations."*

*Pavla Setničková  
IT Business Service Manager ComAp a.s.*

*"Standard CRM processes were not in harmony with our business model, but also with the ERP processes in Dynamics 365 for F&O. To ensure their consistency, this would require too much customization of standard CRM applications. That's why we chose the development path over XRM using North52, which was more comfortable in this case."*

*Václav Chaloupka,  
IT director ComAp a.s.*

## Revision of Sales ideas for companies operating on a global scale and in the 24-hour operation:

**Lead / Account / Contact Management** - with emphasis on integration with Dynamics 365 for Finance and Operations and the structure of Legal Units (due to the multiplicity of customers in ERP from a CRM perspective).

**Opportunity Management** - An entirely resolved business opportunity applicable globally in various countries/currencies/languages and other variations, including a custom product configurator (which downloads current price list data from Dynamics 365 for F&O) and validation and approval procedures as well. Different types of business opportunities (including projects) have different work mechanisms and are transferred to Dynamics 365 for F&O in real-time.

**Engineering Requests Management** - It supports the management of requirements for the development of new products together with the related system of approval and subsequent submission to Dynamics 365 for F&O.

**Custom Notification System** - A sophisticated notification system in which the user can choose which types of records and under what conditions he is interested in, and can subscribe to them.

## Revision of Service ideas for companies operating on a global scale and in 24-hour operation:

**Custom Support Tickets** - Completely created system of support tickets and their management from the creation of the ticket card in the system automatically or manually, subsequent automatic responses to the customer, SLA start (based on location, time zone, and local customer habits), reporting time by the technician, assigning search and segmentation tags, warranty verification via Dynamics 365 for F&O and complete service communication management.

**Custom SLA via LogicApps** - Because the default CRM SLA functionality was found unsatisfactory after two years of operation, a creation of an entirely new customized SLA mechanism using North52, which controls the duration and adjustment of SLA times to customer time zones, locations and holidays. This mechanism is then activated every 10 minutes using LogicApps, as the CRM platform does not include any internal device for batch execution.

# Case study ComAp a.s. - The way to use CRM

## All applied deployments and how performed ...

From the original implementation of **Microsoft Dynamics 365 Customer Engagement**, there was a transition to new **Power Apps** licenses (+ Team member licenses for the need for tracing in Outlook).

## Integration via SCRIBE → Integration via LogicApps using CDS

Customization using Workflows → Customization in North52  
Customization using custom plugins → Customization in North52  
Customization using custom javascript → Customization in North52

North52 is a customization framework for Dynamics 365 / PowerApps that enables streamlining of customizations and guarantees their better readability for other power users of the system and resistance to future upgrades. This framework is a principal tool to make most all the system customizations. Only in exceptional cases was it necessary to use specialized scripts/plugins, with a final ratio of 95: 5 in favor of North52.

- 150 active CRM users
- Microsoft Power Apps with customization North52 framework
- Common Data Services
- Microsoft LogicApps
- Dynamics 365 for Finance & Operations
- DMS SharePoint Online
- Microsoft Office 365

## What do you recommend to customers to evaluate when choosing CRM?



"Being able to look at the needs of the company, the business processes, the suitability of the offered application. It is a mix covered by company culture, supplier, and compatibility. The most important is FOCUS. What you demand from the supplier, you also demand from yourself - even internal people must be focused. I recommend personal meetings, as much as possible 1: 1 communication with the business to perceive all needs and culture of the customer."

"In 7 months, write a new system, including analysis, that was deployable with ERP... Thanks for the incredible performance that belongs to both the NAVERTICA team and the internal ComAp sales team. We feel well done. The benefits and outcomes are visible in CRM, and the business expresses that it has what it needs, and it suits everyone. Now we are stabilizing, we are looking forward to reaping the benefits, and we will continue with small improvements - process optimizations."

Pavla Setničková  
IT Business Service Manager ComAp a.s.

## Who is ComAp a.s.?

ComAp is a Czech company with worldwide operations that provides innovative solutions in the field of development and production of control systems for backup or independent energy sources and industrial combustion engines, including software and accessories. It provides first-class smart products with high flexibility and intuitive operation. ComAp was established in 1991 as a project of three students of the Prague Czech Technical University. ComAp is today one of the three largest producers of control products for power generation and engine control, along with associated accessories and software in the world.

## NAVERTICA a.s. - We are happy to become your professional advisor!

As a modern, internationally operating, and certified partner of ERP and CRM solutions, we will help you streamline internal processes. We will easily guide you through the implementation of suitable products that we use and deploy following the latest trends in the field of application technologies, and we will be happy to help you with digital transformation and a solution built on the cloud. For 30 years, we have been helping to improve the financial results of our customers with the solution we provide. By operating in the Czech and Slovak Republics and with customers in many European countries, South Africa and the USA, we support industry solutions in the segments: manufacturing, trade, services, logistics, project management, and healthcare.

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